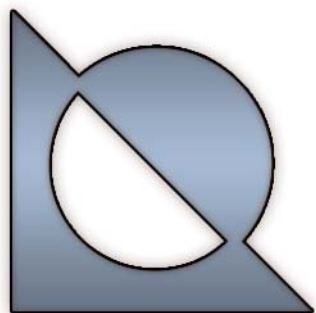




Work-Based Learning Skill Standards

Business & Information Technology



WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

Wisconsin Work-Based Learning Skill Standards – Business & Information Technology

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Foreword

Foreward coming from:

Elizabeth Burmaster
State Superintendent

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This We Believe About the Relationship Between Business Education and Students' Transition to Work

In the current high-performance, results-oriented workplace, everyone must be able to make decisions and learn independently. To succeed in this evolving and unpredictable environment, students need a variety of academic and technical skills as well as career preparation experiences. Employers provide input essential in identifying skills considered vital in the workplace. Educators and employers partner to develop the structures and support for students to acquire the skills needed for employment and continuing education.

Educators use transition-to-work strategies to engage all students in a rigorous and relevant curriculum, to provide them with life and career connections, and to have them explore ever-changing and challenging opportunities in the workplace. Students are motivated and learn best when they understand the relevance of their instruction.

Partnerships

We Believe That through partnerships with business a bridge between education and workplace settings is created. The strength of this bridge is directly related to how well the partners communicate and coordinate their efforts. Partnerships with business are a natural and, in most cases, a required part of every business education program. When these relationships are established, business partners respect what business educators do, learn to rely on the quality of the programs, and have confidence that students are prepared for the workplace. This connection provides real-world experience and builds a clearer motivation for learning. As a result, the more students can relate what they are learning in school to what takes place outside of school, the more connected they become with their own individual school-to-career plans.

We Believe That every student needs a broad understanding of critical aspects of business. Through business partnerships and business education curricula, students:

- Gain knowledge that addresses history, organization, and systems of the work world.
- Gain experience in putting together a business plan and learn how to manage and conduct the day-to-day operations of a business.
- Think critically about the advantages and disadvantages of different types of organizational structures.
- Use financial analysis techniques to determine the profitability of a business enterprise.
- Develop human relations skills and have opportunities to work cooperatively as team members.
- Understand how local, state, national, and international issues affect businesses.
- Develop technological competence.

This knowledge is valuable across all career paths and essential for employment. Business education is the foundation for a broad understanding of these critical aspects of business.

Programs of Study

We Believe That business education programs provide rich opportunities for real-world learning experiences for all students. These opportunities reinforce high academic standards while providing authentic contexts where students are able to apply what they have learned. School-based experiences include vocational student organizations, field trips, guest speakers, and in-school enterprises. Work-based experiences include internships, apprenticeships, cooperative work programs, paid work experiences, job shadowing, community service, and service learning. The unique ability to bridge the gap between theoretical classroom learning and actual workplace experiences is an essential component in students' making successful transitions to work and, ultimately, careers.

We Believe That business education provides a coherent plan to create a personalized learning environment. Through business education, students undertake an ambitious academic program made relevant by its connection to the community and the workplace. Critical to the success of a coherent plan is the inclusion of parents, counselors, and others significant to the student's support system. In the elementary and middle school years, business awareness and exploration activities are integrated into ongoing experiences to provide students initial connections to the world around them. In the high school years, core academic subjects and business education courses provide a broad career perspective. In the post-secondary years, students move from broad to specific career preparation. Business education courses are usually grouped into program sequences or career pathways that facilitate students' transition to work and additional education.

Essential Skills

We Believe That business education is essential for the preparation of students as knowledge workers. Individuals must have the skills to gather, create, and analyze data to produce usable information. Today's businesses, therefore, expect employees to be able to make appropriate decisions about lifelong learning needed in their chosen careers. Students can achieve technical competence, understand theory, apply academic skills in a meaningful way, and integrate career development into satisfying career choices when they participate in the business education program. The ability to bridge the gap between theoretical learning in the classroom and actual practice in the work environment is the essential component in students making a successful transition to work.

Thus, We Believe That business education programs enable students to develop skills essential for successful transition from school to work and, ultimately, careers.

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Introduction

Business activities are such an integral part of the day-to-day routine that most people do not realize the importance or scope of the American business enterprise. The *National Standards for Business Education* and the *Wisconsin Model Academic Standards for Business* both use a comprehensive curriculum model which includes career development. The content of career development should allow a student to gain a developmental understanding of his/her own skill strengths and weaknesses, the evolving requirements of the workplace, and the relationship of lifelong learning to career success. Within the business classroom, a student should develop an awareness of career opportunities and skills to become employable in a variety of business careers.

The *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* is designed to aid the business instructor, workplace mentor, and school-to-work coordinator in delivering the standards and to provide examples of activities to deliver these standards. These activities, however, should only be used as catalysts for instruction.

It is also recommended that the business instructor research industry skill certificates, youth apprenticeship options, and post-secondary articulation opportunities when designing curriculum and learning activities. By aligning curriculum to multiple competencies and skills, business instructors will help students meet workplace expectations.

This guide is designed to develop students' comprehensive competence and lead toward making wise career transitions and to continuously learn new skills and knowledges. As requirements of the workplace evolve, it is the intent of the taskforce that this guide be reviewed and updated annually to include new activities and suggestions from business instructors, workplace mentors, and school-to-work coordinators.

Course Information

Work-Based Learning Skill Standards, Business

Target Population

High school junior or senior student whose career goals and abilities can be matched with a suitable workplace.

Prerequisites

1. Each local work-based learning program determines the prerequisite skill necessary before a student can be eligible for the program.
2. There is an expectation that each student will have had career decision-making experiences and will have made an initial selection of a career major before entering the skill standards program.

Course Description

The *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* is designed in partnership with business and education around the integration of school-based and work-based learning and includes appropriate career development experiences. The skill standards certificates are based on recognized state and national employability, business, and workplace skills. The program provides paid work experience for high school junior or senior students, contributing substantially to their educational and occupational development. The skills are achieved in related classroom instruction and through learning experiences in the workplace which are mentored and assessed. The workplace affords students the opportunities necessary to achieve identified by business and industry for success on the job.

Portfolio and Final Evaluation

The portfolio and final evaluation is comprised of four sections: Section I: Employability Skills, Section II: Business Skills, Section III: Portfolio, and Section IV: Workplace Skills. Sections I, II, and III are the primary responsibility of the classroom teacher and may be achieved through multiple courses, teachers, and school years. The skills in these sections are based upon national and state academic standards. Section IV becomes the primary responsibility of the workplace mentor.

For Section III, the expectation for each student is to have a completed portfolio that includes documentation of each of the skills and activities for the other three sections at the completion of the program. This portfolio may be in a hard-copy binder format or in an electronic format. The purpose of the portfolio is to provide documentation and evidence of the skills a student has learned and demonstrated in the *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* program. In addition, students should include any industry certificates and post-secondary credits earned.

Wisconsin Work-Based Learning Skill Standards – Business & Information Technology

Final Evaluation

Student	School	School Year	Date
Teacher	Workplace		

Section I. Employability Skills – Must complete A and B		
A	Wisconsin Employability Skills Certificate	Score _____ Date Completed _____
	OR	
	Workplace Readiness Assessment (NOCTI)	Score _____ Date Completed _____
B	Job Campaign Materials (includes resume, application form, letter of recommendation, interview)	Date Completed _____
C	Other as identified by local teacher coordinator (optional)	

Section II. Business Skills – Must demonstrate stated minimum standards in each of the four areas		
Business Foundations <i>(minimum 20 standards)</i>	Communication	Number of demonstrated standards _____
	Computation	
Finance <i>(minimum 10 standards)</i>	Accounting	Number of demonstrated standards _____
	Economics	
	Personal Finance	
Information Systems <i>(minimum 10 standards)</i>	Information Technology	Number of demonstrated standards _____
Management <i>(minimum 15 standards)</i>	Business Law	Number of demonstrated standards _____
	Entrepreneurship	
	International Business	
	Management	
	Marketing	

Section III. Portfolio	
Portfolio (includes documented evidence of skills and standards)	Date Completed _____

Section IV. Workplace Skills (Must meet expectation on all areas)			
		Meets Expectation	Does Not Meet Expectation
A	Work Ethic		
B	Workplace Communication		
C	Workplace Technologies		
D	Workplace Relationships		
E	Workplace Diversity		
F	Workplace Safety		
G	Lifelong Learning		

Workplace Mentor Signature	Date
Teacher Coordinator Signature	Date

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Section I – Employability Skills

Career development encompasses an individual's total life. In our changing society, career enhancements and career changes will become common. Individuals must be able to use the tools, resources, and guidance made available to them to make informed decisions. Students in Wisconsin will explore careers and develop skills necessary to make meaningful decisions in a variety of business careers. Students will develop a career cluster focus based on their career development process.

Students are to complete Parts A and B of this section. Part C is optional and may be an additional classroom requirement or district graduation requirement, such as job shadowing or community service hours. Part A should be completed through either the Wisconsin Employability Skills Certificate or through the NOCTI Workplace Readiness Assessment. Since the *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* certificate includes a Workplace Skills section for workplace mentors, it is intended that the Employability Skills section would be completed by the teacher.

Wisconsin Employability Skills Certificate

The *Employability Skills Certificate Program* is intended to recognize a student's mastery of employability skills valued by employers. Every employment opportunity today requires the application of knowledge and skills in a real world context. To that end, the Employability Skill Certificate Program is designed around students attaining skill proficiency in those core employment skills identified by the U.S. Department of Labor Secretary's Commission on Achieving Necessary Skills (SCANS). The employability skills in this program have been identified through the SCANS in partnership with educators, business, industry, and labor representatives. As an integration of academic knowledge in an applied setting, the SCANS competencies build a bridge between school and the workplace.

Research surrounding these recommendations verifies the philosophy of workplace know-how and further defines effective job performance expectations today. The research clearly shows that workplace knowledge consists of two fundamental concepts (competencies and a foundation) which are core employability skills essential for all students, both those entering the work force directly from high school and those planning a post-secondary education. Students completing all program requirements will earn a state certificate that represents the achievement of skill competencies designed to support integrated/applied curriculum and project-based learning. The certificate will be issued by the Department of Public Instruction (DPI). For more information regarding the Employability Skills Certificate, please refer to Appendix B or refer to the DPI Workbased Education website at www.dpi.state.wi.us/dpi/dlsis/let/workbase.html.

Section I – Employability Skills

NOCTI Workplace Readiness Assessment

The National Occupational Competency Testing Institute (NOCTI) is a provider of occupational competency assessments and services. NOCTI's Job Ready tests are designed to measure an individual's knowledge of basic processes including the identification and use of terminology and tools. Job Ready tests can be used for both secondary and post-secondary education as well as business and industry applications. The purposes of these tests are to:

- Measure curriculum effectiveness
- Improve instructional methods
- Successfully link the world of education with the world of work
- Enhance the transition between school and work

The Workplace Readiness Assessment is an 82-question online assessment with a maximum of 3 hours to complete. Immediate raw results will be provided online, and hard-copy comparative analysis will be shipped within five business days.

The areas covered in the NOCTI assessment are:

- Communications
- Problem Solving and Critical Thinking
- Information Technology Applications
- Systems
- Safety, Health and Environment
- Leadership, Management and Teamwork
- Ethics and/or Legal Responsibilities
- Employability and/or Career Development

For more information about NOCTI, contact the NOCTI headquarters at 800-334-6283 or visit their website at www.nocti.org. Appendix C also includes additional information.

Job Campaign

The job campaign refers to the package of documents that is assembled during a job search. Although classroom teachers may have units developed that encompass a job campaign, it is critical that all students complete the standard job campaign documents. These documents include a letter of application, a job application, an interview, and a follow-up letter. It is the teacher's responsibility to ensure that these documents meet acceptable workplace standards. Rubrics for these documents are included in Appendix D.

Section II – Business Skills

The skills in this section are based upon national and state standards. The *Wisconsin's Model Academic Standards for Business* was designed to develop students' comprehensive competence. They begin engaging elementary students in the excitement of the study of business and lead them progressively to higher levels of rigor in each succeeding level. At the completion of secondary school, students should be able to:

- Function as economically literate citizens through the development of personal consumer economic skills, knowledge of social and government responsibility, and an understanding of business operations.
- Demonstrate interpersonal teamwork and leadership skills necessary to function in multicultural business settings.
- Develop career awareness and related skills to enable them to make viable career choices and become employable in a variety of business careers.
- Select and apply the tools of technology as they related to personal and business decision-making.
- Communicate effectively as writers, listeners, and speakers in social and business settings.
- Use accounting procedures to make decisions about planning, organizing, and allocating resources.
- Apply the principles of law in personal and business settings.
- Prepare to become entrepreneurs by drawing from their general understanding of all aspects of business.
- Understand the interrelationships of different functional areas of business and the impact of one component on another.
- Develop the ability to participate in business transactions in both the domestic and international arenas.
- Develop the ability to market the assets each individual has whether they be in the labor market or in the consumer goods market.
- Manage data from all of the functional areas of business needed to make wise management decisions.
- Utilize analytical tools needed to understand and make reasoned decisions about economic issues—both personal and societal.

Standards used in creating activities and skills sets in the *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* guide were based upon the Performance Standards at the level of Business Students in the *Wisconsin's Model Academic Standards for Business*. This level of standards was developed for students completing advanced business courses and programs such as the workbased education program. These standards are also cross-referenced to the standards for English language arts (LA), mathematics (M), and social studies (SS). These standards are not a full curriculum nor requirement for daily instructional practice. School districts can use these standards to build a course and work experience specific to their students' needs.

Although a comprehensive list of standards is provided for each content area in business, it is not intended the entire list of standards be included in this one course. They are provided as a reference for curriculum writing and activity development.

Section II – Business Skills

The curricular areas from the *Wisconsin's Model Academic Standards for Business* and the *National Standards for Business Education* have been divided into four areas: Business Foundations, Finance, Information Technology, and Management. A student must demonstrate the minimum number of standards for each area:

- Business Foundations (20 standards)
- Finance (10 standards)
- Information Technology (10 standards)
- Management (15 standards)

Activities

Although a student's competence in skill is measured through the standards, the activities are the tool to demonstrate those skills. **The activities should integrate workplace information and research into the classroom.**

Activities in this guide are meant to serve as examples and are not to be considered all-inclusive. Instructors may use these examples to develop new activities or enhance current activities. The sample activities indicate which standards are addressed to demonstrate how one activity may address multiple standards. A comprehensive list of all business standards is provided in Appendix A.

Rubrics

Rubrics for activities have been included in Appendix B. These rubrics are general and may be adapted to meet the needs of the district, instructor, or classroom. They are guidelines and not requirements for evaluation purposes. It is recommended that rubrics used for activities are developed to define indicators for different levels of performance.

Section II – Business Skills

Business Foundations

The Business Foundations area encompasses the curriculum of Career Development, Communication, Computation, and Interpersonal and Leadership. These foundation standards permeate all areas of the curriculum and are the underpinning to help students fulfill their roles as citizens, consumers, employees, employers, and entrepreneurs.

Whether in the school setting, workplace, or personal life, it is essential to be an effective writer. Speaking and listening are essential communication skills. Whether in a personal or formal setting, communicators are required to listen, follow instructions, and deliver coherent messages. Communication skills are essential to be successful in the workplace. Students in Wisconsin will communicate in a clear, courteous, concise, and correct manner on personal and professional levels. Computation skills encompass the ability to solve mathematical problems, analyze and interpret data, and apply sound problem solving skills. In order to be successful, workers need to work independently and with others, demonstrate initiative, and work efficiently in a variety of business environments.

Standards

The following standards are taken from the *Wisconsin's Model Academic Standards* and the *National Standards for Business Education (2001)*. Every standard is not meant to be included in every activity nor should it be expected all standards will be covered in the course. They are provided as reference.

Career Development (National Standards for Business Education)

- I. Assess personal skills, abilities, and aptitudes and personal strengths and weaknesses as they relate to career exploration and development.
- II. Utilize career resources to develop a career information database that includes international career opportunities.
- III. Relate the importance of workplace expectations to career development.
- IV. Apply knowledge gained from individual assessment to a comprehensive set of goals and an individual career plan.
 - Explain the importance of participation in professional associations, service organizations, and community programs
- V. Develop strategies to make an effective transition from school to career.
- VI. Relate the importance of lifelong learning to career success.

Communication (National Standards for Business Education)

- I. Communicate in a clear, courteous, concise, and correct manner on personal and professional levels
- II. Apply basic social communication skills in personal and professional situations
- III. Use technology to enhance the effectiveness of communication
- IV. Integrate all forms of communication in the successful pursuit of employment
- V. Incorporate appropriate leadership and supervision techniques, customer service strategies, and personal ethics standards to communicate effectively with various business constituencies.

Section II – Business Skills

Communication (Wisconsin’s Model Academic Standards – Business)

- A.BS.1 Research and write business-specific technical reports that incorporate graphic aids (see LA B.12.1, B.12.2, B.12.3, E.12.1)
- A.BS.2 Analyze and respond to complex business case studies
- A.BS.3 Edit business documents to improve content and effectiveness (see LA B.12.2)
- A.BS.4 Compose, edit, and produce executive summaries (see LA B.12.1, B.12.2, B.12.3)
- A.BS.5 Give a formal presentation using appropriate graphics, media, and support materials (see LA C.12.1, E.12.3)
- A.BS.6 Present point of view on a current business issue
- A.BS.7 Serve effectively as an interviewer or interviewee in public relations, civic, media, and community situations (see LA F.12.1)
- A.BS.8 Evaluate media and oral presentations analytically and critically (see LA C.12.3, E.12.4)
- A.BS.9 Preside at meetings
- A.BS.10 Use negotiation strategies to resolve a conflict
- A.BS.11 Demonstrate the ability to satisfy a customer’s request
- A.BS.12 Prepare and deliver a presentation for a specific business purpose
- A.BS.13 Participate in and evaluate mock interviews
- A.BS.14 Discuss the importance of verbal and nonverbal communications during an interview

Computation (National Standards for Business Education)

- I. Apply basic mathematical operations to solve problems
- II. Solve problems involving whole numbers, decimals, fractions, percents, ratios, averages, and proportions.
- III. Use algebraic operations to solve problems.
- IV. Use common international standards of measurement when solving problems
- V. Analyze and interpret data using common statistical procedures.
- VI. Use mathematical procedures to analyze and solve business problems.

Interpersonal and Leadership Skills (Wisconsin’s Model Academic Standards – Business)

- J.BS.1 Practice appropriate interpersonal skills in a business setting
- J.BS.2 Plan and present short presentations individually or as a member of a team
- J.BS.3 Demonstrate an acceptance of different cultural beliefs and practices
- J.BS.4 Demonstrate successful listening techniques
- J.BS.5 Demonstrate professional behavior in the work environment
- J.BS.6 Participate as a member of a team in a business environment
- J.BS.7 Use appropriate etiquette when relating to business people of various cultures
- J.BS.8 Demonstrate effective consensus-building techniques in a group situation
- J.BS.9 Identify ways in which honesty and integrity of co-workers affect work performance
- J.BS.10 Lead a committee or preside at a meeting
- J.BS.11 Explain the different roles people assume when working in groups

Section II – Business Skills

Example Activities – Business Foundations

Section II – Business Skills

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Section II – Business Skills

Finance

The Finance area encompasses the curriculum of Accounting, Financial Procedures, Economics, and Personal Finance. Making wise decisions is essential for the economic well being of our country. Students need financial knowledge to ensure they make the best decisions both personally and professionally. Whether it is daily transactions or investments for their future, students must understand how to use resources to develop economic growth. Students in Wisconsin will use financial procedures to make decisions about planning, organizing, and allocating resources.

The American economy is based on a private enterprise system in which the sum total of the millions of individual choices made by consumers, workers, and citizens affect the decisions made by business owners and government officials. In order to make these informed decisions, individuals must clearly understand how the system operates while comprehending their role in the system. Students in Wisconsin will use critical-thinking skills to function as citizens who are literate about economics through development of personal consumer economic skills and a knowledge of societal and governmental responsibility.

Standards

The following standards are taken from the *Wisconsin's Model Academic Standards* and the *National Standards for Business Education (2001)*. Every standard is not meant to be included in every activity nor should it be expected all standards will be covered in the course. They are provided as reference.

Accounting (National Standards for Business Education)

- I. Complete and explain the purpose of the various steps in the accounting cycle.
- II. Apply generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity
- III. Prepare, interpret, and analyze financial statements using manual and computerized systems for service, merchandising, and manufacturing businesses
- IV. Apply appropriate accounting principles to payroll, income taxation, managerial systems, and various forms of ownership
- V. Use planning and control principles to evaluate the performance of an organization and apply differential analysis and present-value concepts to make decisions

Section II – Business Skills

Economics (National Standards for Business Education)

- I. Assess opportunity costs and trade-offs involved in making choices about how to use scarce economic resources
- II. Explain why societies develop economic systems, identify the basic features of different economic systems, and analyze the major features of the U.S. economic system
- III. Analyze the role of core economic institutions and incentives in the U.S. economy
- IV. Analyze the role of markets and prices in the U.S. economy
- V. Analyze the different types of market structures and the effect they have on the price and the quality of the goods and services produced
- VI. Explain the importance of productivity and analyze how specialization, division of labor, investment in physical and human capital, and technological change affect productivity
- VII. Analyze the role of government in economic systems, especially the role of government in the U.S. economy
- VIII. Examine the role of trade, protectionism, and monetary markets in the global economy
- IX. Analyze how the U.S. economy functions as a whole and describe selected macroeconomic measures of economic activity

Economics (Wisconsin's Model Academic Standards – Business)

- D.12.1 Describe the components of economic activity and illustrate how they interact with each other
- D.12.2 Describe the possible effects of the national debt on the level of economic activity in the long run (see SS D.8.6)
- D.12.3 Explain how consumer legislation may affect consumer product prices (see SS D.12.5)
- D.12.4 Demonstrate an understanding of current local, state, national, and international economic issues (see SS D.12.6, D.12.13)
- D.12.5 Describe the roles of business enterprises, consumers, and government in our mixed economy (see SS D.8.10, D.12.7, D.12.14)
- D.12.6 Explain how interest rates are determined by market forces and how they influence the amount of borrowing and saving by business investors, consumers, and government officials (see SS D.12.11)
- D.BS.1 Explain the basic characteristics of international trade including absolute and comparative advantage, barriers to free trade, exchange rate, and balance of trade
- D.BS.2 Analyze how income will be affected by factors such as supply and demand, location, level of education, type of industry, union or non-union membership, gender, ethnicity, skill levels, work ethics, worker productivity, and market value of what workers produce
- D.BS.3 Understand the necessity for choices and the role of the decision-making process for analyzing individual business and societal decisions
- D.BS.4 Compare and contrast the different types of economic systems (command, market, traditional, and mixed)
- D.BS.5 Explain the concepts of inflation, unemployment, and Gross Domestic Product and describe how they are measured

Section II – Business Skills

Financial Procedures (Wisconsin's Model Academic Standards – Business)

- C.12.1 Calculate simple interest on loans (see M D.12.3)
- C.12.2 Maintain and reconcile a checking account
- C.12.3 Prepare a budget of personal income and expenses
- C.12.4 Explain the use of credit cards, bank cards, debit cards, credit ratings, and loan applications
- C.12.5 Construct and read charts, tables, and graphs that summarize data from real world situations (see M F.12.2)
- C.12.6 Use calculators appropriately to aid computations and understanding (see M B.4.5)
- C.12.7 Contrast rental, lease, or purchase options of property
- C.12.8 Prepare a simple income tax form
- C.12.9 Contrast short- and long-term investment options
- C.BS.1 Identify, prepare, and analyze financial statements
- C.BS.2 Calculate loan payments with different interest rates (see M D.12.3)
- C.BS.3 Determine cash flow for a business
- C.BS.4 Compare budget figures to actual costs
- C.BS.5 Prepare and maintain payroll records
- C.BS.6 Determine manufacturing costs
- C.BS.7 Use technology to maintain, manipulate, and report financial information

Personal Finance (National Standards for Business Education)

- I. Use a rational decision-making process as it applies to the roles of citizens, workers, and consumers
- II. Identify various forms of income and analyze factors that affect income as a part of the career decision-making process
- III. Develop and evaluate a spending/savings plan
- IV. Evaluate savings and investment options to meet short- and long-term goals
- V. Apply a decision-making model to maximize consumer satisfaction when buying goods and services
- VI. Evaluate services provided by financial deposit institutions to transfer funds
- VII. Analyze factors that affect the choice of credit, the cost of credit, and the legal aspects of using credit
- VIII. Analyze choices available to consumers for protection against risk and financial loss

Section II – Business Skills

Example Activities - Finance

1. Obtain a copy of your company's quarterly or annual report. Present a brief oral report to your class sharing what is included in this report. Who is the intended audience? What is the purpose of the report? How does the information in the report reflect the financial status of the company? (Financial Procedures C.BS.3, C.BS.4; Communication A.BS.1, A.BS.5, A.BS.12)
2. Complete the necessary individual financial records for your position: W-2 form; time card--figure your weekly or bimonthly wages for your position; and individual state and federal income tax forms. In addition, interview a payroll specialist at your worksite. Develop questions to ask him/her regarding the job responsibilities of this position. (Financial Procedures C.BS.5; Communication A.BS.7, A.BS.14; Interpersonal and Leadership J.BS.4)
3. Research within your worksite how purchases are paid for—i.e. on account? With a credit card? Cash? Compare and contrast the business method of payment to paying with a personal credit card. Be sure to include time, rate, and average amount of purchases in your report analysis. (Financial Procedures C.12.4, C.12.6, C.BS.2; Economics D.BS.2, D.12.6; Communication A.BS.4)
4. Create a chart demonstrating an analysis of your workplace business' profit and loss as compared to a national indicator. You may select, for example, GNP, CPI, unemployment rate, GDP, inflation, etc. for the past five years. Explain the correlation. (Financial Procedures C.12.4, C.12.6, C.BS.2, C.BS.7; Economics D.BS.2, D.12.6, D.BS.5; Communication A.BS.4)

Information Technology

Information Technology is a comprehensive curriculum area that encompasses multiple facets of technology skills including but not limited to word processing, spreadsheets, electronic presentation slideshows, databases, electronic mail, desktop publishing, web design and development, operating systems, and hardware.

Information technology is a problem-solving tool that is not an end goal. It is used to help student complete tasks efficiently and effectively and apply the technology to solve problems. Students must be able to select and apply from the tools available. In order to make informed decisions, the student must learn current technology as well as understand ethical and social issues related to the use of technology. Students in Wisconsin will select and apply current information systems/technology as they relate to personal and business decision-making in light of ethical and social issues. **Demonstration of these standards may also be achieved through industry certifications.**

Standards

The following standards are taken from the *Wisconsin's Model Academic Standards* and the *National Standards for Business Education (2001)*. Every standard is not meant to be included in every activity nor should it be expected all standards will be covered in the course. They are provided as reference.

Information Technology (National Standards for Business Education)

- I. Assess the impact of information technology on society
- II. Describe current and emerging computer architecture; configure, install, and upgrade hardware; diagnose and repair hardware problems
- III. Identify, evaluate, select, install, use, upgrade, customize, and diagnose and solve problems with various types of operating systems, environments, and utilities
- IV. Describe the information technology components of major business functions and explain their relationships
- V. Identify, evaluate, select, install, use, upgrade, and customize application software; diagnose and solve problems resulting from an application software's installation and use
- VI. Use input technologies appropriately to enter and manipulate text and data
- VII. Gather, evaluate, use, and cite information from information technology sources
- VIII. Use, plan, develop, and maintain database management systems
- IX. Design, develop, test, and implement programs
- X. Analyze and design information systems using appropriate development tools
- XI. Develop the skills to design, deploy, and administer networks and communications systems
- XII. Use, evaluate, and deploy communications and networking applications
- XIII. Plan the selection and acquisition of information technologies
- XIV. Develop the technical and interpersonal skills and knowledge to support the user and community
- XV. Design and implement risk management policies and procedures for information technology
- XVI. Describe, analyze, develop, and follow policies for managing privacy and ethical issues in organizations and in a technology-based society
- XVII. Describe positions and career paths in information technology

Section II – Business Skills

Information Technology (Wisconsin’s Model Academic Standards – Business)

- B.12.1 Access, navigate, and use online services
- B.12.4 Import text and graphics from other software programs
- B.12.6 Restart and recover from system failure and virus infection as necessary
- B.12.12 Analyze spreadsheet data
- B.12.13 Use desktop publishing software to create documents (see LA E.8.3)
- B.12.18 Send and receive faxes
- B.12.19 Use electronic mail
- B.12.20 Send and respond to voice messages
- B.12.21 Sort and file documents according to established procedures
- B.BS.1 Diagnose and solve problems related to the operation of computer equipment
- B.BS.2 Apply special features of software packages such as galleries, templates, macros, etc.
- B.BS.3 Describe how information systems have changed the workplace
- B.BS.4 Explain how information systems have contributed to worker productivity
- B.BS.5 Use data to create information to solve business problems
- B.BS.6 Use desktop publishing software to design, create, and produce a variety of publications (see LA E.8.3)
- B.BS.7 Import data, graphics, and scanned images using desktop publishing software
- B.BS.8 Use multimedia software to design, create, and produce a variety of presentations (see LA E.8.3)
- B.BS.9 Design and create a web page
- B.BS.10 Evaluate application software products in terms of their features
- B.BS.11 Customize application software
- B.BS.12 Generate complex, multipart documents
- B.BS.13 Use operating system commands
- B.BS.14 Generate business forms
- B.BS.15 Generate newsletters and brochures (see LA E.8.3)
- B.BS.16 Create documents by merging information
- B.BS.17 Establish and maintain a records management system

Example Activities – Information Technology

1. Design a three-column newsletter or tri-fold brochure for your workplace. Include company logo, hours of operation, company history or summary, listing of important contact information and other pertinent information. (B.BS.6, B.BS.7, B.BS.12, B.BS.15)
2. On student-designed letterhead, build a form letter and envelopes to potential customers in proper business letter format utilizing merged information from a database or spreadsheet for a minimum of 10 people. Include a chart and/or table in the letter. Create/use a macro for the closing of the letter. (B.BS.2, B.BS.5, B.BS.7, B.BS.16, B.BS.17)
3. Create a multi-slide presentation illustrating how technology has changed your workplace, your position, and/or your company customer base that incorporates a custom background, slide layout, transitions, text animation, clip art, and design templates. Utilize a digital camera, scanned images, and the company logo. (B.BS.2, B.BS.3, B.BS.6, B.BS.7, B.BS.8)

Section II – Business Skills

Management

The Management area encompasses the curriculum of Business Law, Entrepreneurship, International Business, Management, and Marketing. The knowledge of law is essential in today's society. Whether the law pertains to an individual or a business, students must understand legal principles in order to be a productive citizen and make responsible decisions that protect the individual and society at large. The major components of entrepreneurship incorporate the basic structure of business. Therefore, it is essential for students to have an understanding of entrepreneurship and its place in the education of business. Students in Wisconsin will use business knowledge and preparation to develop an understanding of business operations and the ability and skills necessary to become entrepreneurs.

Businesses are taking on a global focus and workers must be able to participate in both domestic and international environments in order to succeed. Therefore, students need to be able to work in a variety of business and office settings. Students must have the ability to know where to find information needed to make decisions. The knowledge of different function areas of business and what data can be obtained from these areas is essential for students to use in both personal and business management decisions. Students in Wisconsin will select and analyze appropriate information from the business function areas such as marketing, finance, accounting, production, and personnel of business to make informed management decisions.

Marketing is connected to almost every function of business. All people in an organization are responsible for meeting the needs of their consumers and should, therefore, be familiar with the processes involved with marketing.

Standards

The following standards are taken from the *Wisconsin's Model Academic Standards* and the *National Standards for Business Education (2001)*. Every standard is not meant to be included in every activity nor should it be expected all standards will be covered in the course. They are provided as reference.

Business Law (National Standards for Business Education)

- I. Analyze the relationship between ethics and the law and describe sources of the law, the structure of the court system, different classifications of procedural law, and different classifications of substantive law
- II. Analyze the relationships between contract law, law of sales, and consumer law
- III. Analyze the role and importance of agency law and employment law as they relate to the conduct of business in the national and international marketplaces
- IV. Describe the major types of business organizations operating within the socioeconomic arena of the national and international marketplace
- V. Explain the legal rules that apply to personal property and real property
- VI. Analyze the functions of commercial paper, insurance, secured transactions, and bankruptcy
- VII. Explain how advances in computer technology impact such areas as property law, contract law, criminal law, and international law
- VIII. Explain the legal rules that apply to the environment and energy regulation
- IX. Explain the legal rules that apply to marriage, divorce, and child custody
- X. Determine the appropriateness of wills and trusts in estate planning

Section II – Business Skills

Principles of Law: (Wisconsin’s Model Academic Standards – Business)

- I.12.1 Interpret and apply legal principles to business and personal situations
- I.12.2 Differentiate and contrast between felonies and misdemeanors and their penalties
- I.12.3 Understand rights and responsibilities when leasing property
- I.12.4 Identify laws governing credit and credit reporting
- I.12.5 Demonstrate an understanding of legal forms used in business transactions
- I.12.6 Understand laws that govern personal investments and estates
- I.12.7 Identify agencies protecting consumer rights
- I.12.8 Become aware of career opportunities in law-related areas, and understand the technical skills, knowledges, education levels, and skills needed
- I.BS.1 Describe sources of laws and their effect on individuals and society (see SS C.8.3)
- I.BS.2 Identify court systems and procedures (see SS C.8.4)
- I.BS.3 Analyze laws governing starting and maintaining a business
- I.BS.4 List the elements of a business contract, and identify and explain the various types of contracts
- I.BS.5 Demonstrate an understanding of the legislative process, and exhibit an awareness of legislation affecting business
- I.BS.6 Compare and contrast differences in ethical and legal systems from state to state and nation to nation
- I.BS.7 Explain contractual rights and responsibilities
- I.BS.8 Discuss consumer protection legislation
- I.BS.9 Identify contractual capacity
- I.BS.10 Discuss the effects of law on employment relations

Entrepreneurship (National Standards for Business Education)

- I. Recognize that entrepreneurs possess unique characteristics and evaluate the degree to which one possesses those characteristics
- II. Analyze customer groups and develop a plan to identify, reach, and keep customers in a specific target market
- III. Apply economic concepts when making decisions for an entrepreneurial venture
- IV. Use the financial competencies needed by an entrepreneur
- V. Recognize that entrepreneurs must establish, maintain, and analyze appropriate records to make business decisions
- VI. Develop a management plan for an entrepreneurial venture
- VII. Analyze the effect of cultural differences, export/import opportunities, and trends on an entrepreneurial venture in the global marketplace
- VIII. Analyze how forms of business ownership, government regulations, and business ethics affect entrepreneurial ventures
- IX. Develop a business plan

Section II – Business Skills

Entrepreneurship (Wisconsin's Model Academic Standards – Business)

- E.BS.1 Research the unique contributions of entrepreneurs in the American economy
- E.BS.2 Given a business dilemma, identify the problem and analyze possible solutions
- E.BS.3 Design a business plan for a specific business
- E.BS.4 Establish a means for building and maintaining customer loyalty
- E.BS.5 Identify impact of outside sources such as labor unions, trade organizations, and competition when establishing a small business
- E.BS.6 Prepare financial statements for a planned business
- E.BS.7 Evaluate the financial condition of a business based on its financial records
- E.BS.8 Diagram the organizational structure of a planned business
- E.BS.9 Describe practices associated with cultural diversity that would impact a business moving from the national to the international marketplace
- E.BS.10 Develop a business plan for a specific business based on the concepts of successful entrepreneurship, and defend the plan to an investor

International Business (National Standards for Business Education)

- I. Explain the role of international business; analyze how it impacts business at all levels (including the local, state, national, and international levels)
- II. Describe the interrelatedness of the social, cultural, political, legal, and economic factors that shape and impact the international business environment
- III. Apply communication strategies necessary and appropriate for effective and profitable international business relations
- IV. Describe the environmental factors that define what is considered ethical business behavior in a global business environment
- V. Identify forms of business ownership and entrepreneurial opportunities available in international business
- VI. Relate balance of trade concepts to the import/export process
- VII. Analyze special challenges in operations and human resource management in international business
- VIII. Apply marketing concepts to international business situations
- IX. Explain the concepts, role, and importance of international finance and risk management

International Business (Wisconsin's Model Academic Standards – Business)

- G.BS.1 List examples of international trade in the local community
- G.BS.2 Explain advantages and disadvantages of trade agreements between and among nations
- G.BS.3 Identify the relationship between international events and the daily conduct of business
- G.BS.4 Identify international trade partners
- G.BS.5 Explain the role of international business at local, regional, and national levels
- G.BS.6 Explain how time zones around the world affect businesses
- G.BS.7 Compare the resources (e.g., trade routes, transportation centers, foreign trade zones, etc.) of major cities around the world
- G.BS.8 Detail the processes for securing travel documents
- G.BS.9 Explain the role of U.S. Customs and the customs agencies of other countries
- G.BS.10 Identify the role of translators and interpreters in international business settings
- G.BS.11 Use words and phrases important to business people in a given language
- G.BS.12 Explain appropriate business protocol in international business situations

Section II – Business Skills

Management (National Standards for Business Education)

- I. Analyze the management functions and their implementation and integration within the business environment
- II. Analyze management theories and their application within the business environment
- III. Analyze the organization of a business
- IV. Develop personal management skills to function effectively and efficiently in a business environment
- V. Examine the role of ethics and social responsibility in decision making
- VI. Describe human resource functions and their importance to an organization's successful operation
- VII. Describe the role of organized labor and its influence on government and business
- VIII. Utilize information and technology tools to conduct business effectively and efficiently
- IX. Analyze a business organization's competitive position within the industry
- X. Analyze financial data influenced by internal and external factors in order to make short-term and long-term decisions

Principles of Management (Wisconsin's Model Academic Standards – Business)

- H.12.1 Identify the function areas of a business
- H.12.2 Identify and explain a business organizational chart
- H.12.3 Become aware of career opportunities in business organization/ management, and understand the technical skills, knowledges, education levels, and attitudes needed
- H.BS.1 Analyze the pros and cons of different management decisions
- H.BS.2 Develop short-term strategic plans for a business
- H.BS.3 Describe how the organization provides for accountability through authority and responsibility
- H.BS.4 Measure and compare established employment standards
- H.BS.5 Recognize the role of labor and management unions
- H.BS.6 Understand the importance of employer/employee relations

Marketing (National Standards for Business Education)

- I. Recognize customer-oriented nature of marketing and analyze the impact of marketing activities on the individual, business, and society
- II. Analyze the characteristics, motivations, and behaviors of consumers
- III. Analyze the influence of external factors on marketing
- IV. Analyze the elements of the marketing mix, their interrelationships, and how they are used in the marketing process
- V. Analyze the role of marketing research in decision making
- VI. Describe the elements, design, and purposes of a marketing plan

Section II – Business Skills

Marketing (Wisconsin's Model Academic Standards – Business)

- F.12.7 Describe the market research process
- F.12.7 Describe the factors that influence a consumer's decision to buy
- F.12.8 Identify the elements of the promotional mix
- F.12.9 Identify the role of marketing in the United States economy
- F.12.10 Describe various methods of product distribution (logistics)
- F.BS.1 Describe and use a marketing plan
- F.BS.2 Perform market research
- F.BS.3 Test market a product/service
- F.BS.4 Analyze the life cycle of a product/service
- F.BS.5 Analyze the various factors in pricing for a product/service
- F.BS.6 Identify factors that influence the promotional mix of a product/service
- F.BS.7 Identify the steps of the selling process
- F.BS.8 Develop a distribution plan for a product/service

Example Activities – Management

1. Obtain a contract (lease, sales, employment...) from your place of employment and identify the elements of a contract including: offer, acceptance, genuine ascent, capacity, legality, and consideration (Business Law IBS.4, IBS.7, IBS.8, IBS.9)
2. Does the company you work for do business internationally? If so, plan a trip to a conference in a foreign country on behalf of your organization. If not, talk to your supervisor to plan for an expansion into a given country. The report should include:
 - Expense authorization and expense report.
 - Travel itinerary for your trip
 - Secure travel, lodging, transportation, food...
 - Obtain travel documents (passports, currency exchange rates...)
 - Compute currency
 - International protocol
 - Time Zones(Entrepreneurship EBS.2, EBS.9; International Business GBS.4, GBS.6, GBS.8, GBS.9, GBS.11, GBS.12; Information Technology BBS.5, BBS.12; Management HBS.1)
3. Prepare an Employee Handbook for your job that includes an organizational chart, company mission statement, your job description, products/materials utilized in your position, technology necessary to accomplish your tasks, training provided and necessary, competitors/subsidiaries of the company, Company policies (ie Internet acceptable use, Equity policy, phone policy, dress code, etc), relevant employment laws, and legal forms used in business transactions. (Entrepreneurship EBS.8, Management HBS.3, HBS.5; Business Law IBS.10)
4. Develop a marketing plan for a product/service for your business or for a non-profit organization. If international, look at the international business competitors. (Marketing FBS.1, FBS.2, FBS.3, FBS.4, FBS.5, FBS.6, FBS.7, FBS.8; Entrepreneurship EBS.2, EBS.3, EBS.4, EBS.9)

Section II – Business Skills

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Section IV – Workplace Skills

Workplace skills for the *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* guide are skills which may be observed and evaluated by a workplace mentor.

The purpose of the Workplace Skills Evaluation is to be used as a growth tool for the student. It is anticipated that the Workplace Skills Evaluation would be completed by the workplace mentor no less than quarterly. This will ensure consistent feedback for both the student and the teacher. It will allow the student opportunity for input and measurement of growth in demonstration of workplace skills. The form allows opportunity for workplace mentor comments as well as goals for improvement.

The culmination of the Workplace Skills Evaluation, in addition to student-teacher-mentor feedback, will provide the basis for the final assessment of the workplace skills on the Final Evaluation form. All areas must meet the workplace expectation of those skills for the student to certify in the workplace skills section.

Section IV – Workplace Skills

Wisconsin Work-Based Learning Skill Standards – Business & Information Technology

Workplace Skills Evaluation

Student	School	School Year
Workplace Mentor	Workplace	
Date	Evaluation Period <input type="checkbox"/> Quarter 1 <input type="checkbox"/> Quarter 2 <input type="checkbox"/> Quarter 3 <input type="checkbox"/> Quarter 4	

Evaluation Scale – Please use the following scale when evaluating each workplace skill.

!	Creative, inventive, detailed, mature presence of skill
+	Detailed and consistent evidence of the skill
✓	Beginning of or some evidence of the skill
—	Little observation or no opportunity to observe skill

Work Ethic

	!	+	✓	—
1. Exhibits responsible behavior relative to workplace environment				
2. Demonstrates punctuality				
3. Displays dependability				
4. Demonstrates ability to work with others				
5. Displays flexible behavior				
6. Dresses appropriately for workplace				
7. Illustrates pride in work				
8. Applies workplace standards and guidelines to produce and ensure quality work				
9. Shows initiative				
10. Works to maximize personal productivity				
Comments:				

Workplace Communication

	!	+	✓	—
1. Demonstrates effective oral communication skills				
2. Demonstrates ability to receive and give constructive criticism				
3. Uses correct grammar and spelling for workplace communications				
4. Demonstrates appropriate nonverbal communications skills (customers and co-workers)				
5. Provides quality customer service				
6. Demonstrates appropriate telephone techniques				
7. Demonstrates appropriate e-mail etiquette				
Comments:				

Workplace Technologies

	!	+	✓	—
1. Selects and applies appropriate technology for a task				
2. Utilizes technology tools to access and create information				
Comments:				

Section IV – Workplace Skills

Workplace Relationships		!	+	✓	—
1.	Demonstrates appropriate social skills for the workplace				
2.	Displays appropriate listening skills				
3.	Projects a positive attitude				
4.	Demonstrates appropriate employer and employee interactions				
5.	Demonstrates appropriate employee and customer interactions				
6.	Functions as a productive member of team				
Comments:					

Workplace Diversity		!	+	✓	—
1.	Works effectively with a diverse workforce (age group, cultures, genders, etc.)				
2.	Demonstrates the skills necessary to function as a member of a diverse workforce (e.g., diplomacy, patience, willingness to compromise, and ability to listen)				
Comments:					

Workplace Safety & Regulations		!	+	✓	—
1.	Performs work in accordance with employee rights and responsibilities				
2.	Identifies types and sources of workplace hazards				
3.	Complies with workplace safety regulations				
Comments:					

Lifelong Learning		!	+	✓	—
1.	Demonstrates willingness to learn new skills				
2.	Demonstrates the ability to learn new skills				
3.	Analyzes own performance for improvement				
Comments:					

Goals for Improvement:

Workplace Mentor Signature	Date
Student Signature	Date

Section IV – Workplace Skills

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Appendices

Appendix A – Wisconsin’s Model Academic Standards: Business

*Mark an X next to each standard to indicate student exhibits knowledge and skills to meet achievement of that standard		X
Business Foundations – minimum 20 standards		
Communication		
A.BS.1	Research and write business-specific technical reports that incorporate graphic aids (see LA B.12.1, B.12.2, B.12.3, E.12.1)	
A.BS.2	Analyze and respond to complex business case studies	
A.BS.3	Edit business documents to improve content and effectiveness (see LA B.12.2)	
A.BS.4	Compose, edit, and produce executive summaries (see LA B.12.1, B.12.2, B.12.3)	
A.BS.5	Give a formal presentation using appropriate graphics, media, and support materials (see LA C.12.1, E.12.3)	
A.BS.6	Present point of view on a current business issue	
A.BS.7	Serve effectively as an interviewer or interviewee in public relations, civic, media, and community situations (see LA F.12.1)	
A.BS.8	Evaluate media and oral presentations analytically and critically (see LA C.12.3, E.12.4)	
A.BS.9	Preside at meetings	
A.BS.10	Use negotiation strategies to resolve a conflict	
A.BS.11	Demonstrate the ability to satisfy a customer’s request	
A.BS.12	Prepare and deliver a presentation for a specific business purpose	
A.BS.13	Participate in and evaluate mock interviews	
A.BS.14	Discuss the importance of verbal and nonverbal communications during an interview	
Computation* (National Standards, no Wisconsin Business Standards)		
I.	Apply basic mathematical operations to solve problems	
II.	Solve problems involving whole numbers, decimals, fractions, percents, ratios, averages, and proportions	
III.	Use algebraic operations to solve problems	
IV.	Use common international standards of measurement when solving problems	
V.	Analyze and interpret data using common statistical procedures	
VI.	Use mathematical procedures to analyze and solve business problems	
Interpersonal and Leadership		
J.BS.1	Practice appropriate interpersonal skills in a business setting	
J.BS.2	Plan and present short presentations individually or as a member of a team	
J.BS.3	Demonstrate an acceptance of different cultural beliefs and practices	
J.BS.4	Demonstrate successful listening techniques	
J.BS.5	Demonstrate professional behavior in the work environment	
J.BS.6	Participate as a member of a team in a business environment	
J.BS.7	Use appropriate etiquette when relating to business people of various cultures	
J.BS.8	Demonstrate effective consensus-building techniques in a group situation	
J.BS.9	Identify ways in which honesty and integrity of co-workers affect work performance	
J.BS.10	Lead a committee or preside at a meeting	
J.BS.11	Explain the different roles people assume when working in groups	

Appendix A – Wisconsin’s Model Academic Standards: Business

*Mark an X next to each standard to indicate student exhibits knowledge and skills to meet achievement of that standard

X

Finance – minimum 10 standards

Financial Procedures

D.12.1	Describe the components of economic activity and illustrate how they interact with each other	
D.12.2	Describe the possible effects of the national debt on the level of economic activity in the long run (see SS D.8.6)	
D.12.3	Explain how consumer legislation may affect consumer product prices (see SS D.12.5)	
D.12.4	Demonstrate an understanding of current local, state, national, and international economic issues (see SS D.12.6, D.12.13)	
D.12.5	Describe the roles of business enterprises, consumers, and government in our mixed economy (see SS D.8.10, D.12.7, D.12.14)	
D.12.6	Explain how interest rates are determined by market forces and how they influence the amount of borrowing and saving by business investors, consumers, and government officials (see SS D.12.11)	
D.BS.1	Explain the basic characteristics of international trade including absolute and comparative advantage, barriers to free trade, exchange rate, and balance of trade	
D.BS.2	Analyze how income will be affected by factors such as supply and demand, location, level of education, type of industry, union or non-union membership, gender, ethnicity, skill levels, work ethics, worker productivity, and market value of what workers produce	
D.BS.3	Understand the necessity for choices and the role of the decision-making process for analyzing individual business and societal decisions	
D.BS.4	Compare and contrast the different types of economic systems (command, market, traditional, and mixed)	
D.BS.5	Explain the concepts of inflation, unemployment, and Gross Domestic Product and describe how they are measured	

Financial Procedures

C.12.1	Calculate simple interest on loans (see M D.12.3)	
C.12.2	Maintain and reconcile a checking account	
C.12.3	Prepare a budget of personal income and expenses	
C.12.4	Explain the use of credit cards, bank cards, debit cards, credit ratings, and loan applications	
C.12.5	Construct and read charts, tables, and graphs that summarize data from real world situations (see M F.12.2)	
C.12.6	Use calculators appropriately to aid computations and understanding (see M B.4.5)	
C.12.7	Contrast rental, lease, or purchase options of property	
C.12.8	Prepare a simple income tax form	
C.12.9	Contrast short- and long-term investment options	
C.BS.1	Identify, prepare, and analyze financial statements	
C.BS.2	Calculate loan payments with different interest rates (see M D.12.3)	
C.BS.3	Determine cash flow for a business	
C.BS.4	Compare budget figures to actual costs	
C.BS.5	Prepare and maintain payroll records	
C.BS.6	Determine manufacturing costs	
C.BS.7	Use technology to maintain, manipulate, and report financial information	

Appendix A – Wisconsin’s Model Academic Standards: Business

*Mark an X next to each standard to indicate student exhibits knowledge and skills to meet achievement of that standard

X

Information Technology – minimum 10 standards

Information Technology	
B.12.1	Access, navigate, and use online services
B.12.4	Import text and graphics from other software programs
B.12.6	Restart and recover from system failure and virus infection as necessary
B.12.12	Analyze spreadsheet data
B.12.13	Use desktop publishing software to create documents (see LA E.8.3)
B.12.18	Send and receive faxes
B.12.19	Use electronic mail
B.12.20	Send and respond to voice messages
B.12.21	Sort and file documents according to established procedures
B.BS.1	Diagnose and solve problems related to the operation of computer equipment
B.BS.2	Apply special features of software packages such as galleries, templates, macros, etc.
B.BS.3	Describe how information systems have changed the workplace
B.BS.4	Explain how information systems have contributed to worker productivity
B.BS.5	Use data to create information to solve business problems
B.BS.6	Use desktop publishing software to design, create, and produce a variety of publications (see LA E.8.3)
B.BS.7	Import data, graphics, and scanned images using desktop publishing software
B.BS.8	Use multimedia software to design, create, and produce a variety of presentations (see LA E.8.3)
B.BS.9	Design and create a web page
B.BS.10	Evaluate application software products in terms of their features
B.BS.11	Customize application software
B.BS.12	Generate complex, multipart documents
B.BS.13	Use operating system commands
B.BS.14	Generate business forms
B.BS.15	Generate newsletters and brochures (see LA E.8.3)
B.BS.16	Create documents by merging information
B.BS.17	Establish and maintain a records management system

Appendix A – Wisconsin’s Model Academic Standards: Business

*Mark an X next to each standard to indicate student exhibits knowledge and skills to meet achievement of that standard

X

Management – minimum 15 standards

Business Law (Principles of Law)

I.12.1	Interpret and apply legal principles to business and personal situations	
I.12.2	Differentiate and contrast between felonies and misdemeanors and their penalties	
I.12.3	Understand rights and responsibilities when leasing property	
I.12.4	Identify laws governing credit and credit reporting	
I.12.5	Demonstrate an understanding of legal forms used in business transactions	
I.12.6	Understand laws that govern personal investments and estates	
I.12.7	Identify agencies protecting consumer rights	
I.12.8	Become aware of career opportunities in law-related areas, and understand the technical skills, knowledges, education levels, and skills needed	
I.BS.1	Describe sources of laws and their effect on individuals and society (see SS C.8.3)	
I.BS.2	Identify court systems and procedures (see SS C.8.4)	
I.BS.3	Analyze laws governing starting and maintaining a business	
I.BS.4	List the elements of a business contract, and identify and explain the various types of contracts	
I.BS.5	Demonstrate an understanding of the legislative process, and exhibit an awareness of legislation affecting business	
I.BS.6	Compare and contrast differences in ethical and legal systems from state to state and nation to nation	
I.BS.7	Explain contractual rights and responsibilities	
I.BS.8	Discuss consumer protection legislation	
I.BS.9	Identify contractual capacity	
I.BS.10	Discuss the effects of law on employment relations	

Entrepreneurship

E.BS.1	Research the unique contributions of entrepreneurs in the American economy	
E.BS.2	Given a business dilemma, identify the problem and analyze possible solutions	
E.BS.3	Design a business plan for a specific business	
E.BS.4	Establish a means for building and maintaining customer loyalty	
E.BS.5	Identify impact of outside sources such as labor unions, trade organizations, and competition when establishing a small business	
E.BS.6	Prepare financial statements for a planned business	
E.BS.7	Evaluate the financial condition of a business based on its financial records	
E.BS.8	Diagram the organizational structure of a planned business	
E.BS.9	Describe practices associated with cultural diversity that would impact a business moving from the national to the international marketplace	
E.BS.10	Develop a business plan for a specific business based on the concepts of successful entrepreneurship, and defend the plan to an investor	

Management – minimum 15 standards

International Business


G.BS.1	List examples of international trade in the local community	
G.BS.2	Explain advantages and disadvantages of trade agreements between and among nations	
G.BS.3	Identify the relationship between international events and the daily conduct of business	
G.BS.4	Identify international trade partners	
G.BS.5	Explain the role of international business at local, regional, and national levels	
G.BS.6	Explain how time zones around the world affect businesses	
G.BS.7	Compare the resources (e.g., trade routes, transportation centers, foreign trade zones, etc.) of major cities around the world	
G.BS.8	Detail the processes for securing travel documents	
G.BS.9	Explain the role of U.S. Customs and the customs agencies of other countries	
G.BS.10	Identify the role of translators and interpreters in international business settings	
G.BS.11	Use words and phrases important to business people in a given language	
G.BS.12	Explain appropriate business protocol in international business situations	

Principles of Management

H.12.1	Identify the function areas of a business	
H.12.2	Identify and explain a business organizational chart	
H.12.3	Become aware of career opportunities in business organization/ management, and understand the technical skills, knowledges, education levels, and attitudes needed	
H.BS.1	Analyze the pros and cons of different management decisions	
H.BS.2	Develop short-term strategic plans for a business	
H.BS.3	Describe how the organization provides for accountability through authority and responsibility	
H.BS.4	Measure and compare established employment standards	
H.BS.5	Recognize the role of labor and management unions	
H.BS.6	Understand the importance of employer/employee relations	

Marketing

F.12.6	Describe the market research process	
F.12.7	Describe the factors that influence a consumer’s decision to buy	
F.12.8	Identify the elements of the promotional mix	
F.12.9	Identify the role of marketing in the United States economy	
F.12.10	Describe various methods of product distribution (logistics)	
F.BS.1	Describe and use a marketing plan	
F.BS.2	Perform market research	
F.BS.3	Test market a product/service	
F.BS.4	Analyze the life cycle of a product/service	
F.BS.5	Analyze the various factors in pricing for a product/service	
F.BS.6	Identify factors that influence the promotional mix of a product/service	
F.BS.7	Identify the steps of the selling process	
F.BS.8	Develop a distribution plan for a product/service	

<h1 style="margin: 0;">Wisconsin Employability Skills Certificate Program Portfolio</h1>		
YOUTH INFORMATION		
Youth Name		
School District	School Building	
Supervising Teacher		
Address <i>Street, City, State, Zip</i>		
School Telephone <i>Area/No.</i> ()	School Fax <i>Area/No.</i> ()	E-Mail Address
Workplace Mentor		
Work-Based Learning Site (<i>Employer name, street address, city, state, zip code</i>)		
EMPLOYABILITY SKILLS COMPLETED		
Basic SCANS Skills		
Personal/Interpersonal Skills		
Thinking/Information Processing Skills		
Systems/Technology Skills		

INSTRUCTIONS:

Employer: Thank you for your help in mentoring the above named youth to become a more effective future employee. Please rate the youth on the next page, based on the 3-2-1-0 scale at the top of the page, and initial your ratings under the column marked “WB” for work-based. In order to assess improvement, please rate the youth after the first week of his/her job experience under “Preliminary Evaluation” and at the conclusion of their job experience under “Final Evaluation.” If you cannot assess the youth on some of the items due to lack of access to practice/observe the skill, please leave the item(s) blank.

If you have questions, please call _____ at _____.
(local school contact) (phone and e-mail)

School: Please review this Youth Employability Skills Record with the participating youth and ensure that he/she understands the items to be assessed. Any items for which the employer cannot provide exposure/skills practice, must be covered by the school. Please rate the youth on those items and initial the rating in the column marked “SB” for school-based. Between the employer and the school, all items must be rated. In order to receive a State Certificate in Employability Skills, the youth must receive a score of 44 or more, out of a possible 66 points and no more than two items may be rated at a level 1. (No zeros are acceptable in the final evaluation.) Please refer to the “**Wisconsin Employability Skills Certificate Program Final Evaluation**” form online at www.dpi.state.wi.us/dpi/dlsis/let/workbase.html to record the name of the youth, his/her workplace and the total points this youth achieved in the Final Evaluation. Please submit this information electronically to Marilyn Bachim at marilyn.bachim@dpi.state.wi.us. Thank you.

Appendix B – Wisconsin Employability Skills Certificate

Youth Employability Skills Record

3 = Proficient—able to perform entry-level skills independently.

2 = Intermediate—has performed tasks, may need additional training or supervision.

1 = Introductory—is familiar with process but is unable, or no opportunity, to perform task; additional training is required.

0 = No exposure or knowledge of the task/skill.

SB = School Based (Supervising Teacher) or Service Agency Based

WB = Work Based (Workplace Mentor)

<i>Description of Skills</i>	<i>Preliminary Evaluation</i>	<i>Final Evaluation</i>	<i>SB</i>	<i>WB</i>
Basic SCANS Skills				
1. Reading—locates, understands, and interprets written information in prose and in documents such as manuals, graphs, and schedules.				
2. Writing—communicates thoughts, ideas, information, messages in writing; creates documents such as letters, directions, manuals, reports, graphs and flow charts.				
3. Mathematics—Performs basic computations and approaches practical problems by choosing appropriately from a variety of mathematical techniques.				
4. Listening—receives, attends to, interprets, responds to verbal messages & cues.				
5. Speaking—organizes ideas and communicates orally.				
6. Career Development—does activities that may include a self-assessment; researching the labor market; creating a career & education plan; identifying references; completing a job application, resume and cover letter; and demonstrates job-interviewing skills.				
SUBTOTAL (Possible Pts = 18; Required for state certificate = 12)				
Personal/Interpersonal Skills – Displays responsibility, self-esteem, sociability, self-management, integrity, and honesty and extends these skills to facilitating working well with others.				
7. Demonstrates integrity/honesty and chooses ethical courses of action.				
8. Serves clients/customers, working to satisfy customer's expectations.				
9. Participates as a member of a team, contributing to group efforts.				
10. Demonstrates leadership skills, setting a positive example and teaching others.				
11. Works well with women and men from diverse backgrounds.				
SUBTOTAL (Possible Pts = 15; Required for state certificate = 10)				
Thinking/Information Processing Skills – can learn, reason, acquire, and use information to aid thinking.				
12. Organizes, maintains, interprets, and communicates information, using computers to aid this task where necessary.				
13. Recognizes problems; devises and implements plans of action.				
14. Generates new ideas to help solve problems.				
15. Makes decisions by specifying goals and constraints, defining alternatives, considering risks, and evaluating and picking the best choice.				
16. Uses efficient learning techniques and materials to acquire and apply new knowledge and skills.				
SUBTOTAL (Possible Pts = 15; Required pts for state certificate = 10)				
Systems/Technology Skills: Understands complex interrelationships of systems and works with technologies.				
17. Understands the employer's organization and his/her role in it.				
18. Understands technological systems. Able to find errors and corrects problems in technological operations used in his/her job duties.				
19. Selects the appropriate tools or equipment for a task, including computers and related technologies.				
20. Understands the function and proper procedures for technologies related to a task, including computer operating systems, word processing, and spreadsheets.				
21. Understands and can do routine preventative maintenance on equipment and knows when to get additional help.				
22. Understands workplace safety precautions and workplace rules and takes measures to implement them.				
SUBTOTAL (Possible Pts. = 18; Required pts for state certificate = 12)				
GRAND TOTAL (Possible Pts. = 66; Required for state certificate = 44)				

NOCTI WORKPLACE READINESS ASSESSMENT
Test Code: 3031 (Form A) or 3032 (Form B) Version: 01

Written Assessment:

Administration Time: 3 hours

Number of Questions: 82

Areas covered:

27% Communications

17% Problem Solving and Critical Thinking

7% Information Technology Applications

9% Systems

10% Safety, Health and Environment

12% Leadership, Management and Teamwork

5% Ethics and/or Legal Responsibilities

13% Employability and/or Career Development

Specific competencies and skills tested in this assessment:

Communication: Communicate in multiple modes to address needs within the career technical field

- Apply strategies to enhance effectiveness of all types of communications in the workplace
- Apply reading skills and strategies to work-related documents
- Locate information from books, journals, magazines, and Internet.
- Apply basic writing skills to work-related communication
- Write work-related materials
- Use writing/publishing/presentation applications
- Apply basic skills for work-related oral communication
- Lead formal and informal group discussions
- Apply active listening skills to obtain and clarify information
- Communicate with others in a diverse workforce

Problem Solving and Critical Thinking: Solve problems using critical thinking

- Define the problem
- Analyze the problem
- Search out reliable information relevant to the problem
- Formulate ideas, proposals and solutions to problems
- Select potential solutions based on reasoned criteria
- Implement solution(s)
- Evaluate solution(s)

Information Technology Applications: Apply technology resources in the workplace

- Determine use of technology in the workplace.
- Use technology tools to access, manage, integrate, and create information

Systems: Demonstrate an understanding of work-related systems

- Demonstrate an understanding of how business systems function within the economy
- Demonstrate an understanding of the functions of systems in an organization (e.g. production, marketing, human resources, and finance)
- Demonstrate principles of customer service
- Apply industry standards and practices to ensure quality work

Appendix C – NOCTI Workplace Readiness Assessment

Specific competencies and skills tested in this assessment: (continued)

Safety, Health and Environment: Maintain safe and healthful working conditions and environment

- Demonstrate helpful attitudes about occupational safety and health
- Work in accordance with employee rights and responsibilities and employer obligations concerning occupational safety and health
- Assess types and sources of workplace hazards
- Control hazards in the workplace
- Practice environmental conservation and safety

Leadership, Management and Teamwork: Enhance work outcomes through leadership, self-management, and teamwork

- Demonstrate leadership skills
- Demonstrate citizenship skills through service projects
- Organize work activities
- Apply self-management techniques
- Apply group process techniques
- Perform work tasks in a team

Ethics and/or Legal Responsibilities: Practice ethical and legal behavior consistent with workplace standards

- Apply ethical standards of the industry to workplace conduct
- Demonstrate respect for diversity in the workplace
- Perform responsibilities within legal guidelines

Employability and/or Career Development: Develop employability skills to secure and keep employment in chosen field

- Develop a career plan with alternatives
- Apply job search skills to seek, evaluate, apply for and accept employment
- Demonstrate employability skills needed to get and keep a job
- Demonstrate positive work behaviors
- Assess alternative occupational choices (e.g. working conditions, benefits, and opportunities to change)

Sample Questions:

If a sentence contains an unknown technical word, which of the following strategies could help define that word?

- A. Read the surrounding words to get a clue.
- B. Continue reading and hope the word's meaning will become clear.
- C. Stop reading and look for a definition.
- D. Sound out the word in question.

A graphical illustration of a schedule that helps to track specific tasks across the timeline of a project is a _____ chart.

- A. Gantt
- B. pie
- C. time-series
- D. control

Appendix C – NOCTI Workplace Readiness Assessment

The language used in constructing most websites is

- A. www
- B. html
- C. dBase
- D. Windows XP

The three major types of economic resources are

- A. money, banks, and finances
- B. land, labor, and capital
- C. equipment, goods, and services
- D. cash, profit, and marketing

The Right-to-Know Act requires that employees are

- A. trained to use safety devices
- B. allowed to review personal evaluation reports
- C. responsible to inform employers if they have a criminal record
- D. made aware of hazardous substances in the workplace

Which of the following items are needed to assure an effective business meeting?

- A. a place to meet, a convenient time, and food
- B. a written agenda, a leader who listens, and a person selected to take notes
- C. a scenic location, a directive leader, and comfortable chairs
- D. refreshments, no smoking, and a quiet environment

Government regulations are generally designed to

- A. create jobs for government workers
- B. protect the public from harmful or unjust actions
- C. increase the number of political campaigns
- D. make people think before they vote

Networking, placement offices, employment agencies, and newspaper want ads are examples of

- A. sources for job leads
- B. resources for researching careers
- C. places to send resumes
- D. common job options

Appendix C – NOCTI Workplace Readiness Assessment

Analytic Writing Assessment Rubric

	1	2	3	4	5
Ideas/Content	unfocused topic, incomplete ideas, lacks details, no purpose	identifiable topic, few original ideas, disconnected, focus shifts, few supporting details	general focus on topic, some original ideas, some supporting details	focuses on topic, original, supporting details, attempts insightful conclusions	clear topic, original ideas, connection of ideas, enriching details, insightful conclusion
Organization	beginning, middle or end; ideas not connected, few sequenced and logical ideas	attempts beginning, middle, end; few connected ideas, some sequenced and logical ideas	adequate beginning, middle, end; most ideas connected, most ideas sequenced and logical, attempted transitions	good beginning, middle, end, ideas connected, sequenced and logical, transitions obvious	inviting beginning, middle, end; coherent, sequenced and logical ideas, thoughtful transitions within and between paragraphs
Word Choice	repeats too much, inappropriate word choice, no attempt at descriptive words	limited word choice, little use of descriptive words, inconsistent word usage	some variety, lacks feelings, mostly consistent and correct usage, words support ideas	some variety and range, correct usage, interesting, lively words	wide variety and range, precise word choice, correct usage, paints picture, figurative language
Sentence Fluency	sentences not clear, may sentence fragments, no variety in length and type, confused meaning	some unclear sentences, run, some sentence fragments, little variety in length and type	most sentences clearly written, simple sentences, some variety in length, controlled structure	clearly written sentences, complete sentences, variety sentence length and type	flow and rhythm, connected, clear meaning, good variety of sentence length and type, natural sounding
Conventions	constant distractions in grammar, capitalization, punctuation, usage and spelling	frequent errors in grammar, capitalization, punctuation, usage, spelling and paragraphing	moderate errors in grammar, capitalization, punctuation, usage, spelling and paragraphing	minor errors in grammar, capitalization, punctuation, usage, spelling and paragraphing	correct grammar, capitalization, punctuation, usage, spelling and paragraphing
Voice	ignores audience, uninvolved, lifeless, monotone	functional, dispassionate, somewhat flat, vague, disconnected, factual	sincere, pleasant, acceptable, fairly routine, avoid risk, occasionally amuses	amusing, surprising, brings to life, somewhat moving, takes risks, written from the heart	individualistic, convincing, expressive and engaging, paints a picture

Student Oral Presentation Rubric

	1	2	3	4
Organization	Audience cannot understand presentation because there is no sequence of information.	Audience has difficulty following presentation because student jumps around.	Student presents information in logical sequence which audience can follow.	Student presents information in logical, interesting sequence which audience can follow.
Subject Knowledge	Student does not have grasp of information; student cannot answer questions about subject.	Student is uncomfortable with information and is able to answer only rudimentary questions.	Student is at ease with expected answers to all questions, but fails to elaborate.	Student demonstrates full knowledge (more than required) by answering all class questions with explanations and elaboration.
Graphics	Student uses superfluous graphics or no graphics	Student occasionally uses graphics that rarely support text and presentation.	Student's graphics relate to text and presentation.	Student's graphics explain and reinforce screen text and presentation.
Mechanics	Student's presentation has four or more spelling errors and/or grammatical errors.	Presentation has three misspellings and/or grammatical errors.	Presentation has no more than two misspellings and/or grammatical errors.	Presentation has no misspellings or grammatical errors.
Eye Contact	Student reads all of report with no eye contact.	Student occasionally uses eye contact, but still reads most of report.	Student maintains eye contact most of the time but frequently returns to notes.	Student maintains eye contact with audience, seldom returning to notes.
Elocution	Student mumbles, incorrectly pronounces terms, and speaks too quietly for students in the back of class to hear.	Student's voice is low. Student incorrectly pronounces terms. Audience members have difficulty hearing presentation.	Student's voice is clear. Student pronounces most words correctly. Most audience members can hear presentation.	Student uses a clear voice and correct, precise pronunciation of terms so that all audience members can hear presentation.

PowerPoint Assessment Rubric

ACTIVITY	10 Points Exemplary	8 Points Proficient	6 Points Partially Proficient	4 Points Incomplete
Introduction	The introduction presents the overall topic and draws the audience into the presentation with compelling questions or by relating to the audience's interests or goals.	The introduction is clear and coherent and relates to the topic.	The introduction shows some structure but does not create a strong sense of what is to follow. May be overly detailed or incomplete and is somewhat appealing to the audience.	The introduction does not orient the audience to what will follow. The sequencing is unclear and does not appear interesting or relevant to the audience.
Content	<p>The content is written clearly and concisely with a logical progression of ideas and supporting information.</p> <p>The project includes motivating questions and advanced organizers that provide the audience with sense of the project's main idea.</p> <p>Information is accurate, current and comes mainly from * primary sources.</p>	<p>The content is written with a logical progression of ideas and supporting information.</p> <p>Includes persuasive information from *primary sources.</p>	<p>The content is vague in conveying a point of view and does not create a strong sense of purpose.</p> <p>Includes some persuasive information with few facts.</p> <p>Some of the information may not seem to fit.</p> <p>*Primary source use is not always clear.</p>	<p>The content lacks a clear point of view and logical sequence of information.</p> <p>Includes little persuasive information and only one or two facts about the topic.</p> <p>Information is incomplete, out of date and/or incorrect.</p> <p>Sequencing of ideas is unclear.</p>
Text Elements	<p>The fonts are easy-to-read and point size varies appropriately for headings and text.</p> <p>Use of italics, bold, and indentations enhances readability.</p> <p>Text is appropriate in length for the target audience and to the point.</p> <p>The background and colors enhance the readability of text.</p>	Sometimes the fonts are easy-to-read, but in a few places the use of fonts, italics, bold, long paragraphs, color or busy background detracts and does not enhance readability.	Overall readability is difficult with lengthy paragraphs, too many different fonts, dark or busy background, overuse of bold or lack of appropriate indentations of text.	The text is extremely difficult to read with long blocks of text and small point size of fonts, inappropriate contrasting colors, poor use of headings, subheadings, indentations, or bold formatting.

PowerPoint Assessment Rubric (continued)

ACTIVITY	10 Points Exemplary	8 Points Proficient	6 Points Partially Proficient	4 Points Incomplete
Layout	The layout is aesthetically pleasing and contributes to the overall message with appropriate use of headings and subheadings and white space.	The layout uses horizontal and vertical white space appropriately.	The layout shows some structure, but appears cluttered and busy or distracting with large gaps of white space or uses a distracting background.	The layout is cluttered, confusing, and does not use spacing, headings and subheadings to enhance the readability.
Citations	Sources of information are properly cited so that the audience can determine the credibility and authority of the information presented. All sources of information are clearly identified and credited using MLA/APA citations throughout the project.	Most sources of information use proper MLA/APA citation, and sources are documented to make it possible to check on the accuracy of information.	Sometimes copyright guidelines are followed and some information, photos and graphics do not use proper MLA/APA citations.	No way to check validity of information.
Graphics, Sound and/or Animation	The graphics, sound and/or animation assist in presenting an overall theme and make visual connections that enhance understanding of concept, ideas and relationships. Original images are created using proper size and resolution, and all images enhance the content. There is a consistent visual theme.	The graphics, sound and/or animation visually depict material and assist the audience in understanding the flow of information or content. Original images are used. Images are proper size, resolution.	Some of the graphics, sounds, and/or animations seem unrelated to the topic/theme and do not enhance the overall concepts. Most images are clipart or recycled from the WWW. Images are too large/small in size. Images are poorly cropped or the color/resolution is fuzzy.	The graphics, sounds, and/or animations are unrelated to the content. Graphics do not enhance understanding of the content, or are distracting decorations that create a busy feeling and detract from the content.
Writing Mechanics	The text is written with no errors in grammar, capitalization, punctuation, and spelling.	The text is clearly written with little or no editing required for grammar, punctuation, and spelling.	Spelling, punctuation, and grammar errors distract or impair readability. (3 or more errors)	Errors in spelling, capitalization, punctuation, usage and grammar repeatedly distract the reader and major editing and revision is required. (more than 5 errors)

